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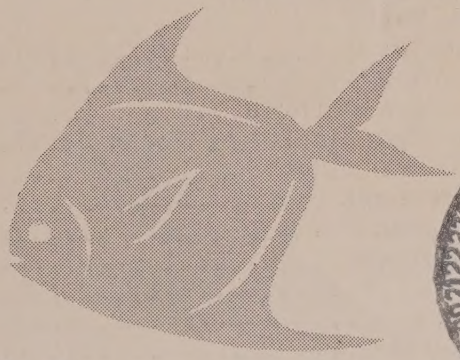
COMMERCIAL FISHERIES OUTLOOK



MARKETS

SUPPLY

DEMAND

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October - December 1957

U.S. FISH AND WILDLIFE SERVICE
Department of the Interior
Washington, D. C.

Fishery Leaflet 336 hh

United States Fish and Wildlife Service
Department of the Interior

Fishery Leaflet 336 hh

Washington 25, D. C. October, 1957

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Prepared in the Branch of Commercial Fisheries

COMMERCIAL FISHERIES OUTLOOK

October - December 1957

THE OUTLOOK AT A GLANCE

BUSINESS ACTIVITY	Continued at high level.
FOOD	Supplies plentiful - demand active - markets strong.
FISHERY PRODUCTION	Generally below 1956 and beginning a seasonal decline.
COLD-STORAGE HOLDINGS	Almost 3 percent higher than a year earlier with wide variations in several items.
MARKETS, EDIBLE FISH	Steady-to-firm for most species.
MARKETS, INDUSTRIAL PRODUCTS	Fish oils firm, meal and solubles steady.
IMPORTS	High for groundfish fillets and blocks, tuna, fresh-water species, shrimp and spiny lobsters.
EXPORTS	Declining slightly for fish oils, but still high.

GENERAL BUSINESS CONDITIONS

OUTLOOK

The high level of economic activity will continue in the fourth quarter without too much change. Seasonally adjusted figures indicate record activities for sales, services, and construction.

PERSONAL INCOME - During August, the annual rate of total personal income reached a level of $347.5 billion, which was $1 billion higher than July, and $18 billion over the same month in 1956.

COST OF LIVING - New heights were reached in August when the cost of living index hit 121 (1947-49 = 100). Higher prices for food and housing were main factors in this all-time high.

AGRICULTURE - Fourth quarter will bring higher meat prices, especially beef and pork. Total per capita meat consumption for 1957 probably below 1956 because of population increase and slightly smaller supplies. Farm income in August was $800 million more than a year earlier.

FOOD INDEX - During August, the food index rose approximately 5.5 percent higher than a year earlier.

CREDIT AND FINANCES - Inflationary pressures stronger, interest rates might be pushed to new highs.

INDUSTRIAL PRODUCTION - In August the industrial production index remained unchanged from a month earlier at 144 percent of the 1947-49 average.

NEW CONSTRUCTION - Bids for new construction were up 3 percent from a year earlier figure.

DISTRIBUTION - Department store sales expected to continue high. Adjusted index in August was estimated at 134.

***

FOOD OUTLOOK

The supplies of principal food products generally will be high but some will be slightly below the present all-time record levels.

MEATS

Total 1957 supplies likely to be lower than the record volume of 1956. Livestock production and slaughter will continue below the very high level of 1956 for some time. Beef supplies in the fourth quarter will increase seasonally but fall short of last year. Pork supplies also will rise seasonally. Toward the end of the year, the slaughter rate will probably exceed the comparable period of the previous year. Not much change is expected in lamb supplies.

POULTRY AND EGGS

Egg supplies will be below 1956 levels before the end of the fourth quarter. By the end of the year, layers will be down 6 to 8 percent from a year ago. Turkey supplies for 1957 will be record high. There are approximately 5 percent more turkeys available this year. Cold-storage stocks are largest on record.

DAIRY PRODUCTS

For the remainder of 1957, the milk supply will continue heavier than a year ago levels. Although there will be an increase, there will be less than expected.

VEGETABLES

Supplies of fresh vegetables are expected to be somewhat smaller than last year and the average. Smaller pack of canned vegetables is expected which will be offset by larger carry-over stocks. Total supplies of canned vegetables probably smaller than last year but much larger than average. Supplies of frozen vegetables will be at or near record levels of 1956.

FATS AND OILS

Both exports and domestic consumption of food fats are expected to be about the same as last year, although indications are that per capita consumption of food fats will be down slightly. Population growth will tend to maintain the level.

GENERAL FISHERY SITUATION

NATIONAL TUNA WEEK is scheduled this year for the period from October 31 through November 9. This is the tuna industry's special promotional campaign. An intensive promotion on a Nationwide basis is planned for canned tuna packed in oil. The United States Government will cooperate with the industry as usual through use of the facilities of the Bureau of Commercial Fisheries, Department of the Interior, and the Agricultural Marketing Service and Extension Service, Department of Agriculture. An active marketing program which will include the home consumer, food trade associations, and institutional markets is planned. This effort is aimed at increasing the demand for canned tuna packed in oil which, at present, is in heavy supply.

COLD-STORAGE HOLDINGS on September 1, 1957 were about 4.5 million pounds higher than those at the same date a year earlier.

TOTAL PRODUCTION OF ALL FISH AND SHELLFISH will probably run considerably below last year. The half-year mark indicated a decline of approximately 400 million pounds from a year ago and the fourth quarter production for most species is seasonally low.

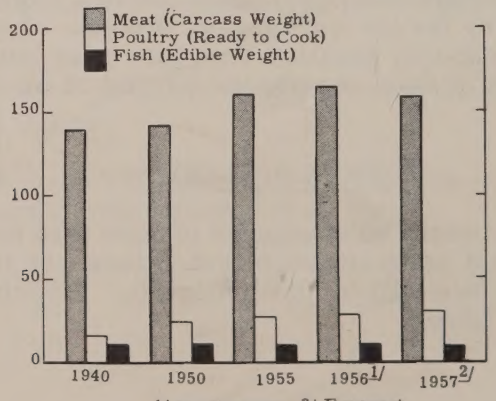
CANNED SALMON MARKET will continue strong, with short supplies, and resulting high prices.

FRESH-WATER FISH domestic landings will taper off while imports from Canada will probably rise.

HALIBUT TOTAL PRODUCTION expected to be lower than last year with resulting firm market.

INDUSTRIAL PRODUCTS expected to experience a price rise because of drop in menhaden production.

CHART 1 - PER CAPITA CONSUMPTION
(in pounds)



1/ Preliminary 2/ Forecast

Fishery Products in Cold-Storage

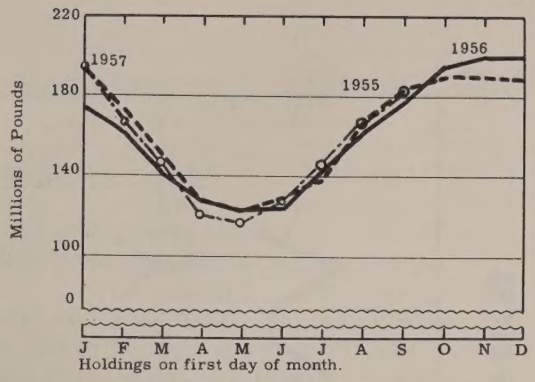
September 1

1957.....183,298,000 Lbs.

1956.....178,785,000 Lbs.

1955.....184,217,000 Lbs.

CHART 2 - FISHERY PRODUCTS IN COLD STORAGE



Holdings on first day of month.

On September 1 total cold-storage holdings of fish and shellfish were close to 3 percent or 4.5 million pounds more than those on the same date a year earlier. Included in these figures were about 13.8 million pounds of bait and animal food for 1957 and 11.1 million pounds in 1956. Major changes in species holdings from a year earlier are shown on the accompaning table, in millions of pounds:

1957 As Compared To 1956

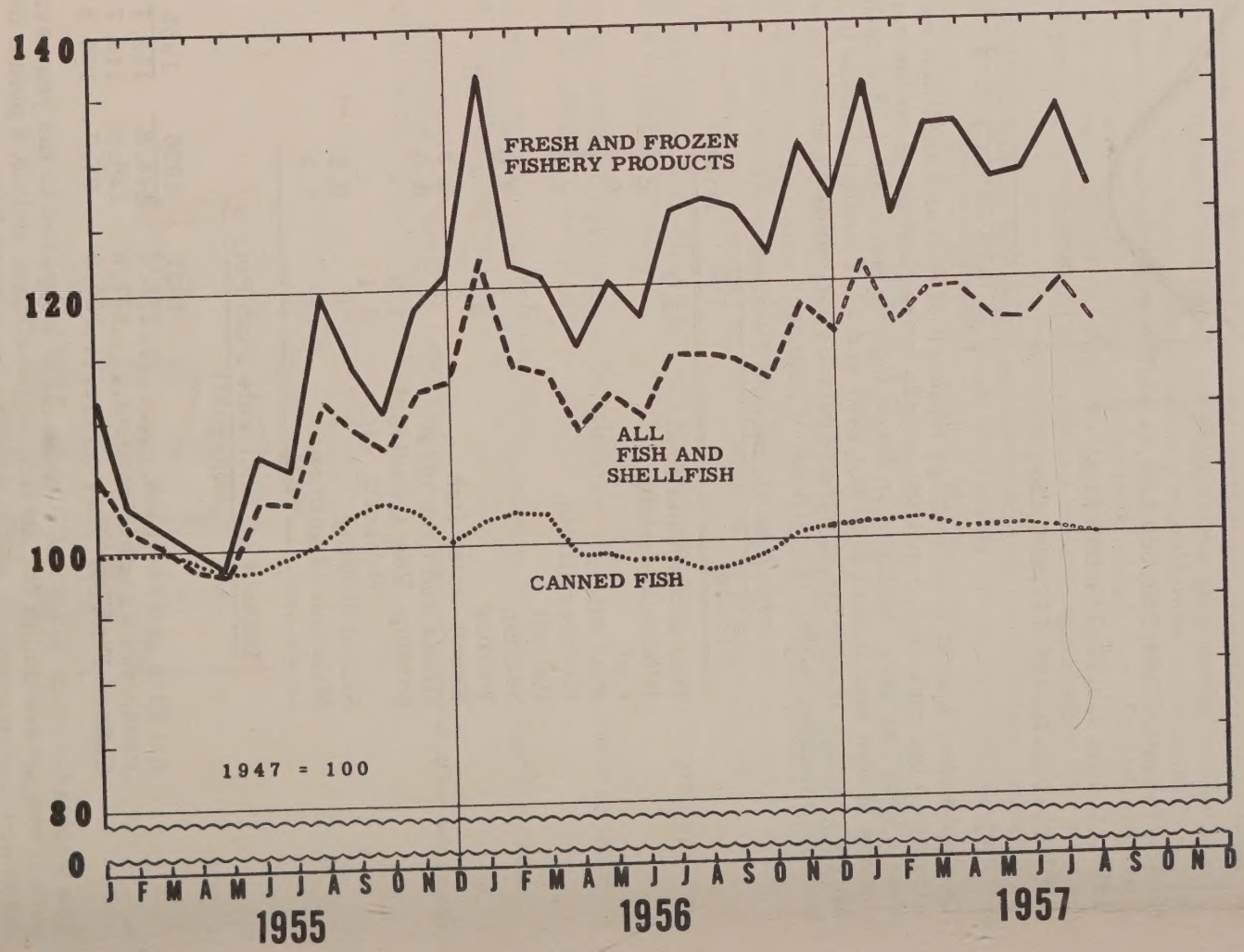
Product	Up	Down
Bait and animal food	2.7	-
Blocks and slabs	-	6.1
Cod	-	0.6
Fish sticks	-	1.3
Haddock fillets	-	1.4
Halibut	2.5	-
Salmon	-	3.0
Whiting	8.3	-
Fresh-water fish	-	0.3
Crabs and crab meat	-	0.6
Shrimp: Raw (headless)	1.9	-
Breaded, etc.	2.1	-
Salted herring	-	0.5
Mild-cured salmon	-	1.5

Indexes of Wholesale Fish Prices
(August)

	1957	1956	1955
All Fish and Shellfish	116.4	114.6	111.7
Fresh and Frozen Products	127.0	126.5	119.7
Canned Fish	100.2	97.7	100.3

The wholesale price index for August, 1957 compared to the year earlier period was up 1.8 points for all fish and shellfish, only 0.5 points for fresh and frozen products and 2.5 points for canned fish.

CHART 3 - INDEXES OF WHOLESALE FISH PRICES


140
120
100
80
0
FRESH AND FROZEN FISHERY PRODUCTS
ALL FISH AND SHELLFISH
CANNED FISH
1947 = 100
J F M A M J J A S O N D J F M A M J J A S O N D J F M A M J J A S O N D
1955
1956
1957

ANCHOVIES, CANNED

Market - Steady Supplies - Moderate Demand - Good

Domestic Pack, January - June

1957.....575,120 Std. Cases
1956.....530,641 Std. Cases

Production of canned anchovies from January through July 1957 was almost 8 percent more than during the same period a year earlier. It is expected that the fourth quarter pack will be higher than normal. Sardine shortages could be one reason.

Prices - It is doubtful that there will be any change in the canned prices which have remained steady for some time.

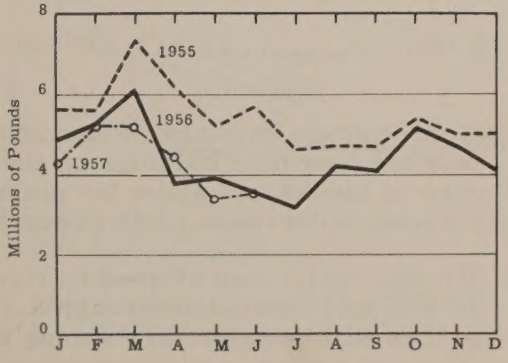
FISH STICKS

Market - Steady Supplies - Liberal Demand - Good

Production, January - June

1957..... 26,101,000 Lbs.
1956..... 27,491,000 Lbs.
1955..... 34,568,000 Lbs.

CHART 4 - FISH STICK PRODUCTION



Production of fish sticks during the first six months of 1957 was 1.4 million pounds lower than the production during the same period a year earlier. However, second quarter production was up 2 percent from last year, with the Atlantic Coast States accounting for 84 percent of the total (Chart 4).

Cold-Storage Holdings

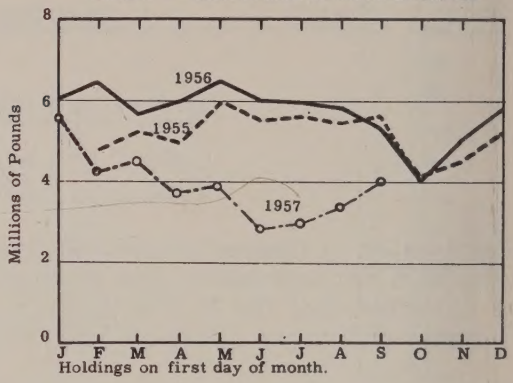
Fish Sticks

September 1

1957..... 4, 068, 000 Lbs.

1956..... 5, 370, 000 Lbs.

CHART 5 - FISH STICKS IN COLD STORAGE



Holdings on first day of month.

Cold-Storage Holdings

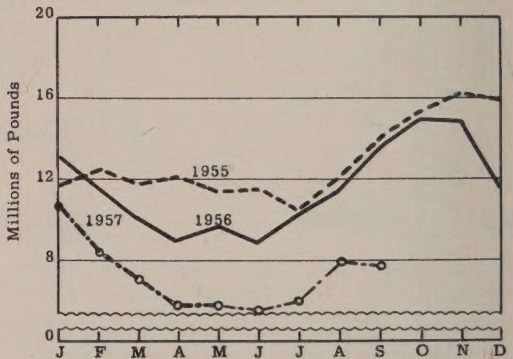
Blocks and Slabs

September 1

1957..... 7, 571, 000 Lbs.

1956..... 13, 711, 000 Lbs.

CHART 6 - BLOCKS AND SLABS IN COLD STORAGE



Holdings on first day of month.

Cold-storage holdings of fish sticks on September 1 were about 24 percent less than holdings on the same date in 1956 (Chart 5). Holdings of blocks and slabs for making fish sticks were at 7, 571, 000 pounds, a decrease of 45 percent from a year earlier (Chart 6).

Prices, which had started to rise in January, began a slight decline in May and continued through July. However, it is expected that prices will become firm during the last quarter.

FLOUNDERS AND SOLE

Market - Firm Supplies - Moderate Demand - Good

Massachusetts Landings

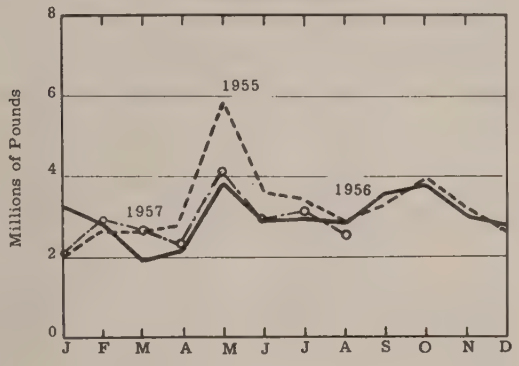
(January - August)

1957..... 22,797,000 Lbs.

1956..... 22,640,000 Lbs.

1955..... 25,418,000 Lbs.

CHART 7 - LANDINGS OF FLOUNDER AND SOLE, MASSACHUSETTS



Landings of flounders and sole in Massachusetts through August 1957 were about the same as those on a similar date last year, and 10 percent lower than the January-August, 1955 figure. Landings will slack off during last quarter (Chart 7).

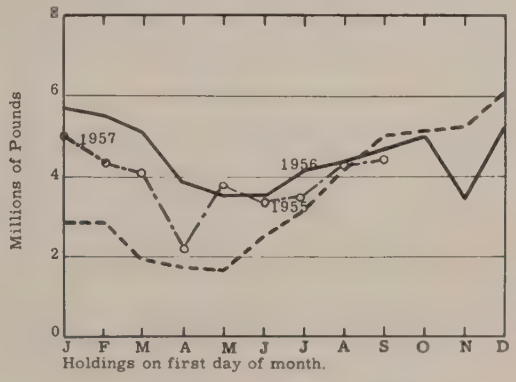
Cold-Storage Holdings

September 1

1957..... 4,463,000 Lbs.

1956..... 4,716,000 Lbs.

CHART 8 - FLOUNDER AND SOLE FILLETS IN COLD STORAGE



Cold-storage holdings on September 1 were approximately 5 percent lower than the holdings on September 1, 1956 (Chart 8).

FLOUNDERS AND SOLE (Cont.)

Imports, January - July

(Fillets)

1957.....7,885,000 Lbs.

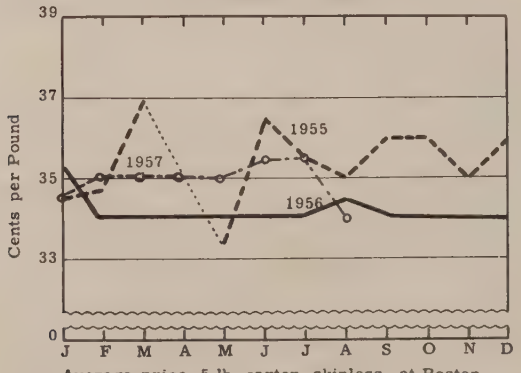
1956.....7,198,000 Lbs.

1955.....6,947,000 Lbs.

Imports of flounders and sole fillets continue to increase. During the first seven months they were 10 percent more than the imports through July, 1956, and about 14 percent higher than those through the same period in 1955.

Prices will remain firm with the possibility of a slight rise during last quarter (Chart 9).

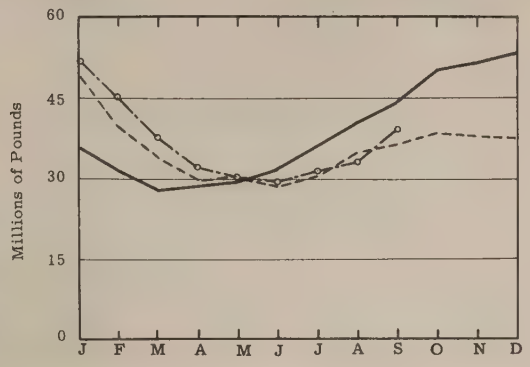
CHART 9 - WHOLESALE PRICE OF YELLOWTAIL FLOUNDER FILLETS



Average price, 5 lb. carton, skinless, at Boston.

GROUNDFISH FILLETS, INCLUDING OCEAN PERCH

CHART 10 - GROUNDFISH FILLETS IN COLD STORAGE



Cold-Storage Holdings

September 1

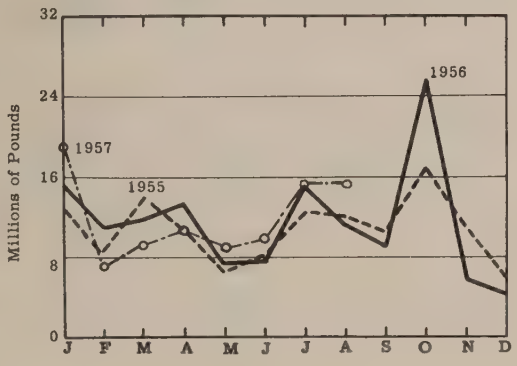
1957..... 38,653,000 Lbs.

1956..... 43,708,000 Lbs.

1955..... 36,694,000 Lbs.

Cold-storage holdings on September 1 were approximately 12 percent lower than those of a year earlier but 5 percent higher than on the same date in 1955. The tables on the succeeding pages list the changes in fillet holdings by species (Chart 10).

CHART 11 - IMPORTS OF GROUNDFISH FILLETS



Imports, January-August

1957..... 97,354,000 Lbs.

1956..... 93,824,000 Lbs.

1955..... 87,265,000 Lbs.

Imports during August amounted to 15.4 million pounds, an increase of 4.2 million pounds or 38 percent over the same month in 1956. The imports during the first eight months of 1957 were up about 3.5 million pounds over the same period of last year. Canada supplied 75 percent of the total imports for the eight-month period (Chart 11).

COD FILLETS

Market - Steady Supplies - Moderate Demand - Good

Cold-Storage Holdings

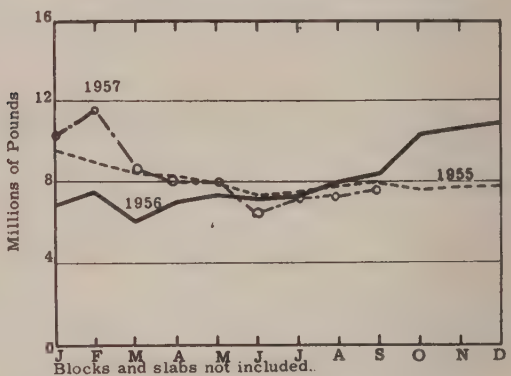
September 1

1957..... 7,797,000 Lbs.

1956..... 8,437,000 Lbs.

1955..... 8,050,000 Lbs.

CHART 12 - COD FILLETS IN COLD STORAGE



Blocks and slabs not included.
Holdings on first day of month.

Cold-storage holdings of cod fillets on September 1 were about 7.5 percent less than holdings on the same date in 1956. Canadian holdings on August 1 totaled 5,793,000 pounds compared with 5,893,000 pounds a year earlier (Chart 12).

Landings during the fourth quarter are expected to drop, while prices will probably rise slightly. Usual seasonal pattern.

Imports, January - July

1957..... 23,321,000 Lbs.

1956..... 25,626,000 Lbs.

1955..... 21,421,000 Lbs.

Imports of cod fillets during the first seven months of 1957 were down 9 percent from a corresponding period in 1956, but they exceeded, by approximately the same percentage, the imports during the first seven months of 1955.

HADDOCK FILLETS

Market - Steady Supplies - Moderate Demand - Good

Cold-Storage Holdings

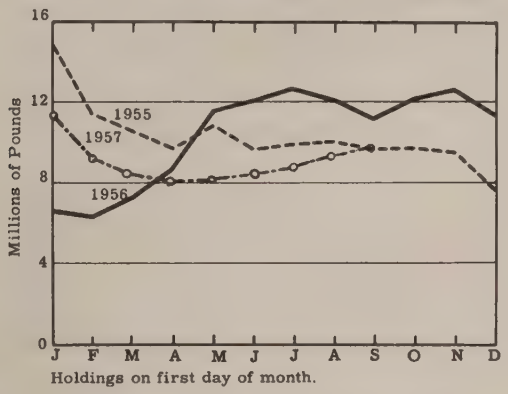
September 1

1957..... 9,890,000 Lbs.

1956..... 11,260,000 Lbs.

1955..... 9,856,000 Lbs.

CHART 13 - HADDOCK FILLETS IN COLD STORAGE



Holdings on first day of month.

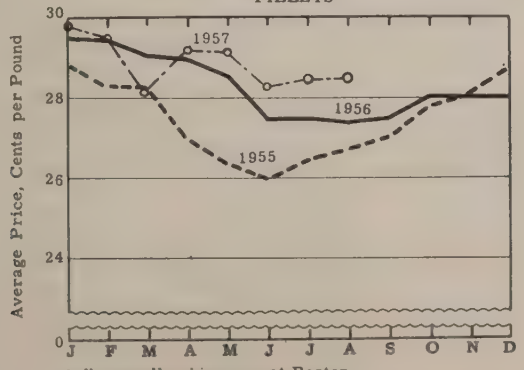
Cold-storage holdings of haddock fillets on September 1, 1957, represented a decrease of 12 percent from the holdings on the corresponding date in 1956. Canadian holdings on August 1, 1957, were down 40 percent from the same date in 1956 (Chart 13).

Production during last quarter of 1957 is expected to taper off only slightly during latter part.

Imports of haddock fillets during January-June 1957 totaled about 16.8 million pounds compared with imports of 19.7 million pounds during the same period in 1956.

Wholesale average prices, which have not fluctuated more than 1.6 cents per pound during 1957, are expected to rise only slightly as production drops during the fourth quarter (Chart 14).

CHART 14 - WHOLESALE PRICE OF HADDOCK FILLETS



1-lb. small, skins on, at Boston.

OCEAN PERCH FILLETS

Market - Steady Supplies -Moderate Demand - Good

Cold-Storage Holdings

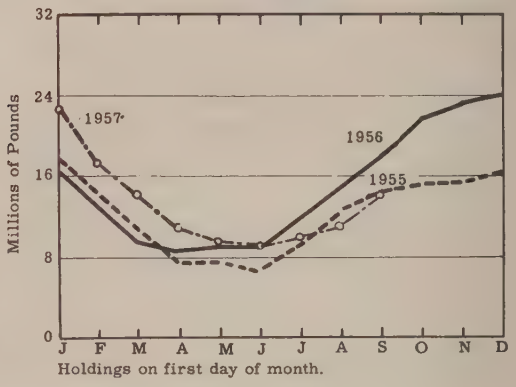
September 1

1957..... 14,128,000 Lbs.

1956..... 17,918,000 Lbs.

1955..... 14,137,000 Lbs.

CHART 15 - OCEAN PERCH FILLETS IN COLD STORAGE



Holdings on first day of month.

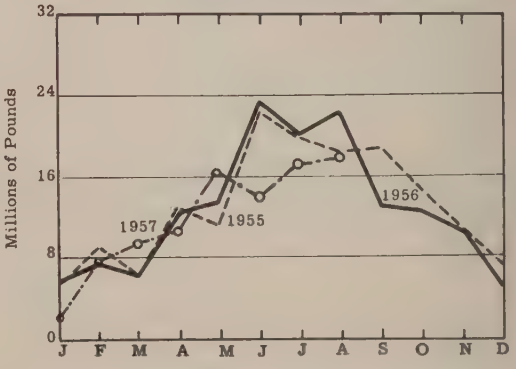
Cold-storage holdings of ocean perch fillets on September 1 of this year were down approximately 21 percent from the holdings on the same date a year earlier. However, they were up 28 percent over the previous month. This increase in holdings will continue until the highest level is reached sometime during the fourth quarter(Chart 15).

CHART 16 - LANDINGS OF OCEAN PERCH, MAINE AND MASSACHUSETTS

Landings, January-August

1957..... 96,188,000 Lbs.

1956..... 112,176,000 Lbs.



Landings of ocean perch in the New England area during the first eight months of 1957 decreased by more than 14 percent from the landings in the same period a year earlier. Total 1957 catch will be lower than that for 1956 (Chart 16).

OCEAN PERCH FILLETS (Cont.)

Imports

January - July

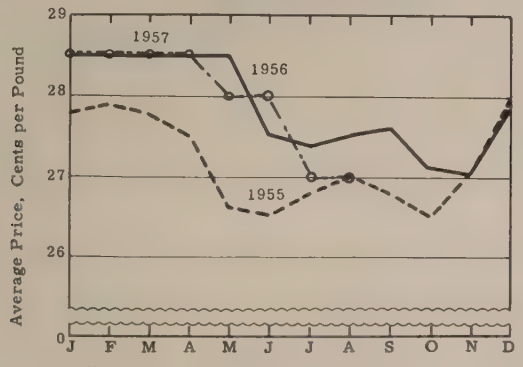
1957..... 7,699,000 Lbs.

1956..... 9,414,000 Lbs.

Imports of ocean perch through July of this year were down almost 18 percent from the similar period last year. More than 59 percent of the total was supplied by Canada.

Prices should rise slightly in the latter part of the fourth quarter when landings decrease still further (Chart 17).

CHART 17 - WHOLESALE PRICE OF FROZEN OCEAN PERCH FILLETS



1-lb. carton, large, skins on, at Boston.

POLLOCK FILLETS

Market - Firm Supplies - Moderate Demand - Moderate

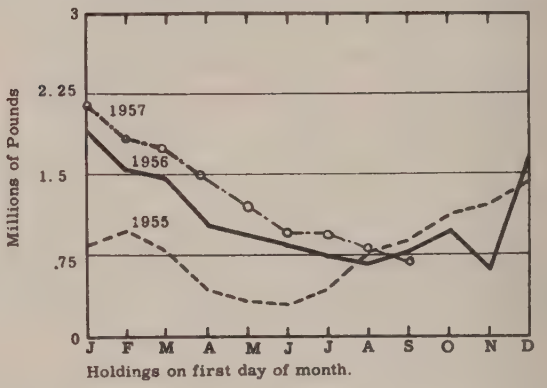
Cold-Storage Holdings

September 1

1957..... 681,000 Lbs.

1956..... 806,000 Lbs.

CHART 18 - POLLOCK FILLETS IN COLD STORAGE



Cold-storage holdings of pollock fillets on September 1 were almost 16 percent below the holdings on the same date last year. Fourth quarter should bring usual seasonal rise (Chart 18).

Prices should remain steady.

HALIBUT

Market - Steady Supplies - Moderate Demand - Good

Landings of halibut through August, at all Pacific ports, totaled 57.6 million pounds. This is an increase of 2.6 percent or 1.5 million pounds over landings on same date last year. Indications are that this year's supply will fall short of 1956 landings by approximately 6 million pounds. Many vessels of the fleet have turned to other types of fishing because of the poor halibut landings.

Cold-Storage Holdings

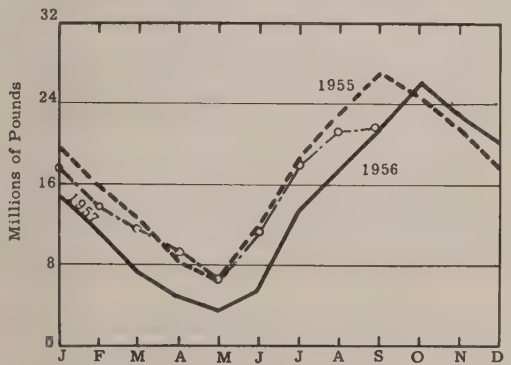
September 1

1957.....21,878,000 Lbs.

1956.....21,625,000 Lbs.

1955.....27,082,000 Lbs.

CHART 19 - HALIBUT IN COLD STORAGE

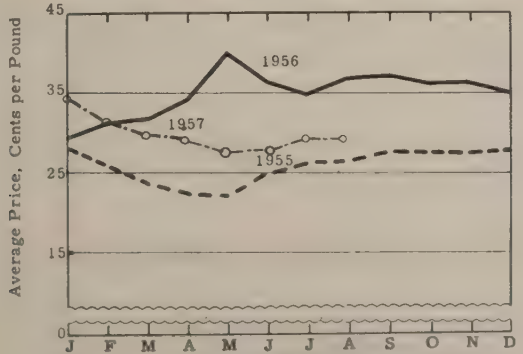


Holdings on first day of month.

Cold-storage holdings on September 1 were about the same as last year but down 24 percent from the holdings on the same date in 1955 (Chart 19).

Wholesale prices for halibut in New York City have been below 1956 prices since March. This trend will continue even as prices show slight increase during the quarter (Chart 20).

CHART 20 - WHOLESALE PRICE OF HALIBUT

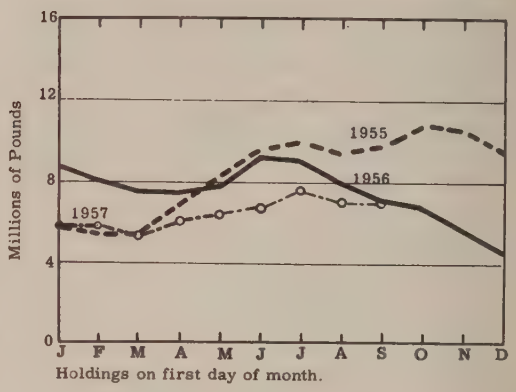


Western, dressed, 20-80 lbs., frozen, at New York

HERRING, SEA

Market - Steady Supplies - Moderate Demand - Moderate

CHART 21 - SALTED HERRING IN COLD STORAGE



Cold-Storage Holdings

September 1

1957	6,698,000 Lbs.
1956	7,152,000 Lbs.
1955	9,778,000 Lbs.

Cold-storage holdings of salted sea herring on September 1 were about 6 percent lower than on the same date last year. Generally, holdings of salted herring decline slightly during the fourth quarter (Chart 21).

Prices are expected to decline slightly during the fourth quarter.

MACKEREL, FRESH AND FROZEN

Market - Active Supplies - Light Demand - Good

Landings of mackerel along the Atlantic Coast seasonally decline rather sharply during the latter part of the fourth quarter.

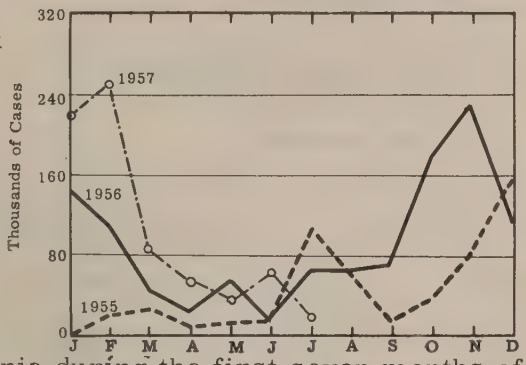
Cold-storage holdings on September 1 stood at 917,000 pounds, which is almost 34 percent below those on a similar date last year.

Prices should remain firm during the fourth quarter.

MACKEREL, CANNED

Market - Steady Supplies - Liberal Demand - Light

CHART 22 - CALIFORNIA PACK OF CANNED JACK AND PACIFIC MACKEREL



Pack of Pacific and Jack Mackerel

January - July

1957.....716,000 Std. Cases

1956.....457,000 Std. Cases

1955.....194,000 Std. Cases

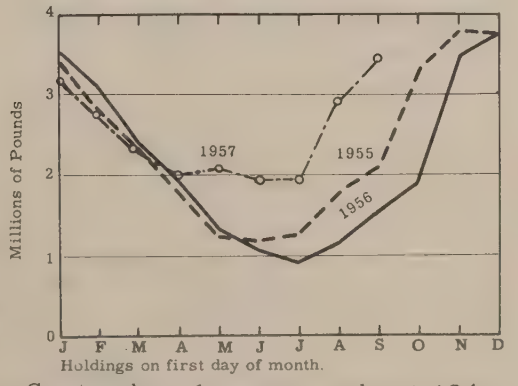
Pack of canned mackerel in California during the first seven months of 1957 exceeded the pack of a year earlier by approximately 57 percent. Normally the fourth quarter pack is the highest (Chart 22).

Prices for canned mackerel are low and indications are that they will continue to be low, but might remain firm if sardine season is poor. Most of the pack is exported.

SABLEFISH

Market - Steady Supplies - Moderate Demand - Heavy

CHART 23 - SABLEFISH (BLACK COD) IN COLD STORAGE



Cold-Storage Holdings

September 1

1957..... 3,465,000 Lbs.

1956..... 1,546,000 Lbs.

1955..... 2,114,000 Lbs.

Cold-storage holdings of sablefish on September 1 were up about 124 percent from the same date a year earlier (Chart 23).

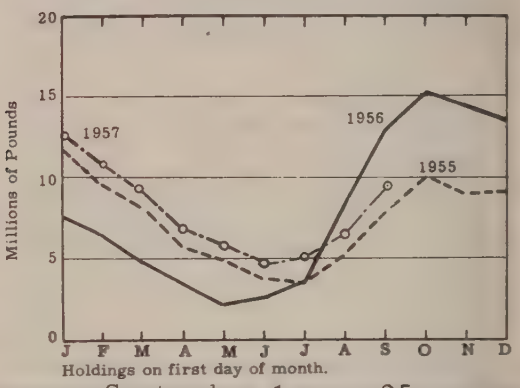
Landings normally increase during the fourth quarter. However, excessively large inventories could discourage production.

Prices will remain firm for smokers, with prices for the smaller sizes dropping.

SALMON, FRESH AND FROZEN

Market - Steady Supplies - Liberal Demand - Good

CHART 24 - SALMON IN COLD STORAGE



Holdings on first day of month.

Cold-Storage Holdings

September 1

1957..... 9,453,000 Lbs.

1956..... 12,687,000 Lbs.

1955..... 7,596,000 Lbs.

Cold-storage holdings of frozen salmon on September 1 were 25 percent lower than the year earlier holdings, and about 24 percent higher than the holdings on September 1, 1955. Stocks were mostly comprised of kings and silvers (Chart 24).

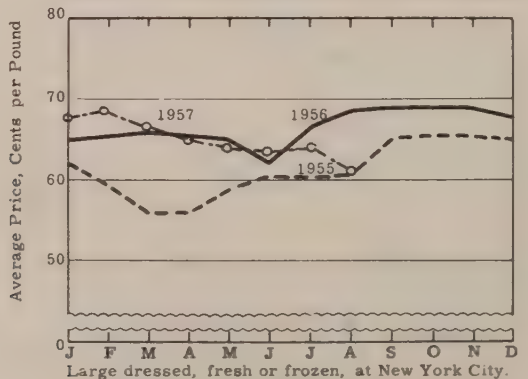
Imports, January-July

1957..... 6,064,000 Lbs.
1956..... 3,707,000 Lbs.

Imports of fresh and frozen salmon through July, 1957, were 64 percent higher than they were for a similar period in 1956. Canada accounted for approximately 98 percent of such imports.

Prices will level off during the fourth quarter and remain below those of 1955 and 1956 (Chart 25).

CHART 25 - WHOLESALE PRICE OF KING SALMON



Large dressed, fresh or frozen, at New York City.

SALMON, MILD-CURED

Market - Steady Supplies - Moderate Demand - Good

Cold-Storage Holdings

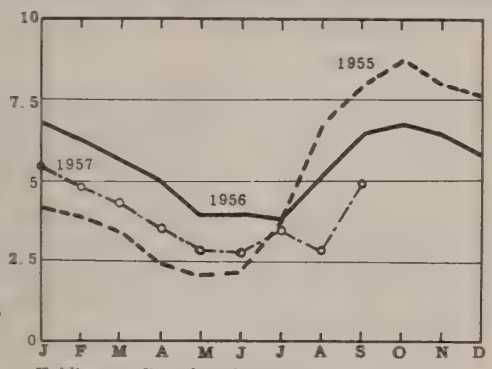
September 1

1957.....4, 984, 000 Lbs.

1956.....6, 504, 000 Lbs.

1955.....7, 990, 000 Lbs.

CHART 26 - MILD-CURED SALMON IN COLD STORAGE

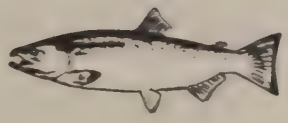


Holdings on first day of month.

Cold-storage holdings on September 1 were down approximately 23 percent from the holdings a year earlier, and down almost 38 percent from those on the same date in 1955 (Chart 26).

Production this season has been very light and the total California pack is estimated at only about 25 percent of 1956.

Prices are expected to become firm during the last quarter because of the small pack. Heavy inventories at the beginning of the season caused a soft market which will improve.



SALMON, CANNED

Market - Firm Supplies - Light Demand - Good

Alaska Pack

(Season Pack)

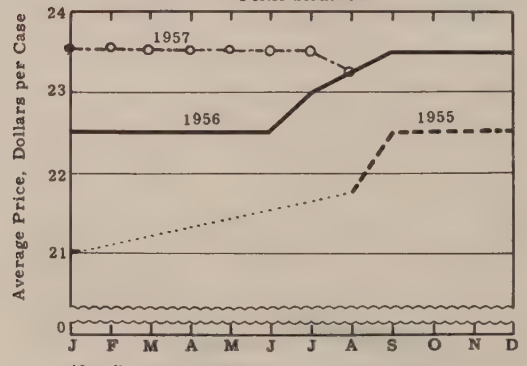
1957..... 2,401,000 Std. Cases
1956..... 2,980,000 Std. Cases
1955..... 2,388,000 Std. Cases

The Alaska pack of salmon for the 1957 season was more than 19 percent lower than that of a year earlier. Preliminary figures indicate that chums represented the largest pack of any individual species, about 33 percent, while kings remained about the same as 1956. Packs of others were disappointing.

Imports of canned salmon from Canada and Japan during the first seven months of 1957 totaled 8,045,000 pounds compared with 11,773,000 pounds during the first seven months of 1956. Total 1957 imports probably will not equal the 28,803,000 pounds brought in during last year.

Wholesale prices for canned salmon, which are high, will remain firm because of short supplies during the last quarter (Chart 27).

CHART 27 - WHOLESALE PRICE OF CANNED PINK SALMON



48-1 lb. cans, at Seattle.

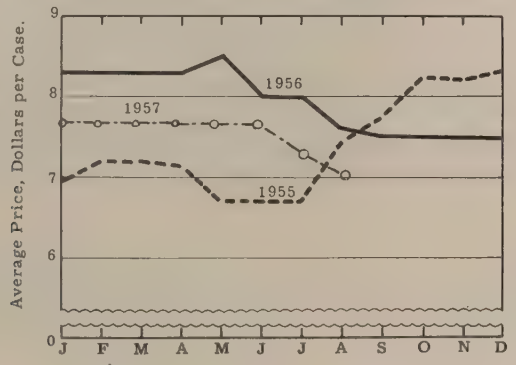
SARDINES, CANNED (MAINE)

Market - Steady Supplies - Moderate Demand - Good

Pack of Maine sardines will probably be less than in 1956. Seasonally, canners are active in beginning of last quarter. However, because of large inventories and low prices, some canners have curtailed their operations.

Prices have dropped markedly and August figures were at the lowest level since July, 1955. Some strengthening should occur during latter part of fourth quarter (Chart 28).

CHART 28 - WHOLESALE PRICE OF MAINE SARDINES



100-3¼ ounce cans, keyless, oil pack, at New York

SARDINES, CANNED (CALIFORNIA)

Market - Firm Supplies - Light Demand - Good

Pack prospects for California sardines during the fourth quarter are poor. The 1957 season in southern California opened September 1, instead of October 1, and will close on December 1, a month earlier than previously. No landings of any significance are expected.

Wholesale prices for the new pack are expected to be steady, but exports will be negligible since the domestic markets will take most of the pack.

Exports, January - June

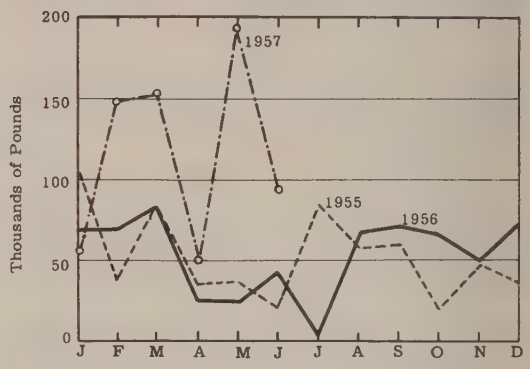
1957	9,026,000 Lbs.
1956	22,707,000 Lbs.
1955	20,345,000 Lbs.

Imports of Sardines Not-in-Oil

January - June

1957	689,000 Lbs.
1956	321,000 Lbs.
1955	315,000 Lbs.

CHART 29 - IMPORTS OF SARDINES, CANNED NOT-IN-OIL



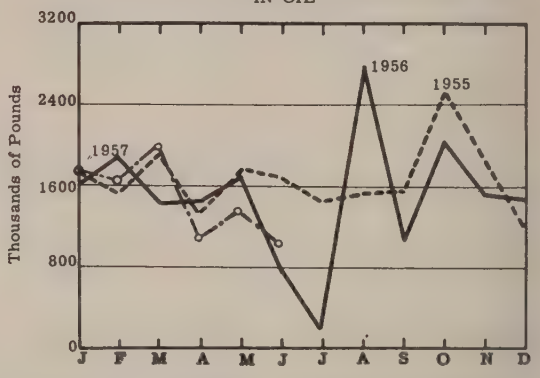
Imports of sardines canned not-in-oil have increased substantially, and during the first six months were 115 percent more than those during the same period, 1956. Indications are that they will continue high (Chart 29).

Imports of Sardines-in-Oil

January-June

1957	8,890,000 Lbs.
1956	8,972,000 Lbs.
1955	10,038,000 Lbs.

CHART 30 - IMPORTS OF SARDINES CANNED IN-OIL



Imports of sardines canned-in-oil through June, 1957, were about the same as a year earlier, but approximately 11 percent below the same period in 1955. The fourth quarter should bring a slight rise in imports with prices remaining steady and high (Chart 30).

SWORDFISH

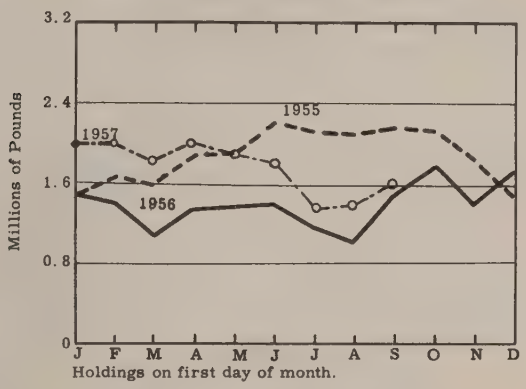
Market - Steady Supplies - Moderate Demand - Good

Cold-Storage Holdings

September 1

1957.....	1,614,000 Lbs.
1956.....	1,504,000 Lbs.
1955.....	2,164,000 Lbs.

CHART 31 - SWORDFISH IN COLD STORAGE



Cold-storage holdings of swordfish on September 1 were about 7 percent higher than those of a year earlier, and 27 percent lower than in 1955 (Chart 31).

Imports of swordfish through July totaled 10,393,000 pounds compared with imports of 10,457,000 pounds for the same period a year earlier.

Prices will remain firm throughout the fourth quarter.

TUNA, CANNED

Market - Steady Supplies - Liberal Demand - Active

Cannery Receipts of Fresh and Frozen Tuna, Southern California

January - July
(In Tons)

	Imports	Domestic	Total
1957	35,339	83,018	118,357
1956	29,817	97,431	127,248

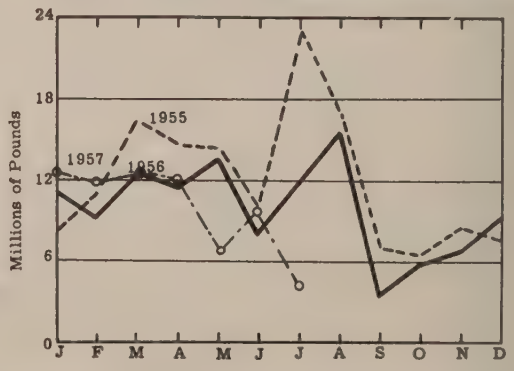
Cannery receipts of tuna through July of this year were down 7 percent from a year earlier with imported tuna representing about 30 percent of these receipts.

Imports, Frozen Tuna

January - July

1957	83,012,000 Lbs.
1956	78,833,000 Lbs.
1955	98,087,000 Lbs.

CHART 32. - IMPORTS OF FRESH AND FROZEN TUNA



Imports of frozen tuna received at all U. S. ports during the first seven months of 1957 increased by 5 percent above those for the same 1956 period, and 15 percent below those of 1955 (Chart 32).

California Pack of Canned Tuna

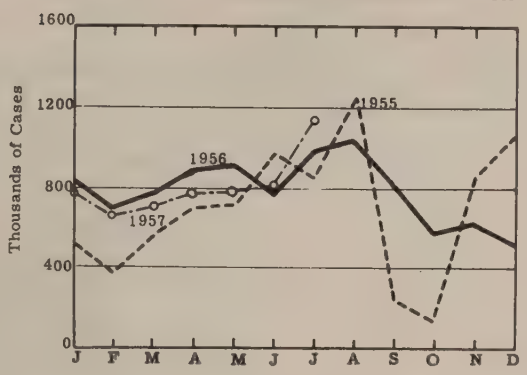
January - July

1957..... 5, 550, 000 Std. Cases

1956..... 5, 893, 000 Std. Cases

1955..... 4, 708, 000 Std. Cases

CHART 33 - CALIFORNIA CANNED TUNA PACK



Pack of canned tuna in California in the first seven months, 1957, was down almost 6 percent from that during the similar period last year, but exceeded the period pack of 1955 by 18 percent. Inventories are reported to be slightly higher than in 1956. Pack for the year will be below 1956 because of a tieup of almost half the tuna clipper fleet for several months (Chart 33).

Imports of Canned Tuna and Bonito

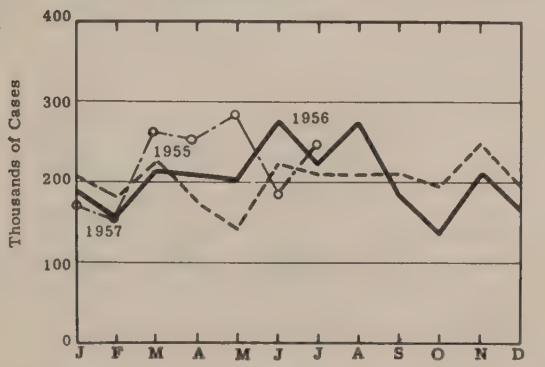
January - July

1957..... 1, 572, 000 Std. Cases

1956..... 1, 481, 000 Std. Cases

1955..... 1, 365, 000 Std. Cases

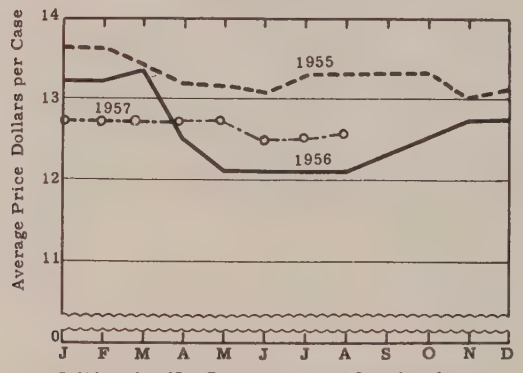
CHART 34 - IMPORTS OF CANNED TUNA AND BONITO



Imports of canned tuna and bonito through July of this year were 6 percent higher than during the same period in 1956, but should tend to level off during the last quarter (Chart 34).

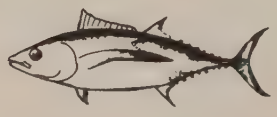
Wholesale prices generally will remain steady at the present level during the fourth quarter. It is a possibility that the regulation establishing a definition and standard of fill for canned tuna will have the eventual effect of increasing the price for some brands (Chart 35).

CHART 35 - WHOLESALE PRICE OF CANNED LIGHT MEAT TUNA



Solid pack, 48 - 7 ounce cans, at Los Angeles.

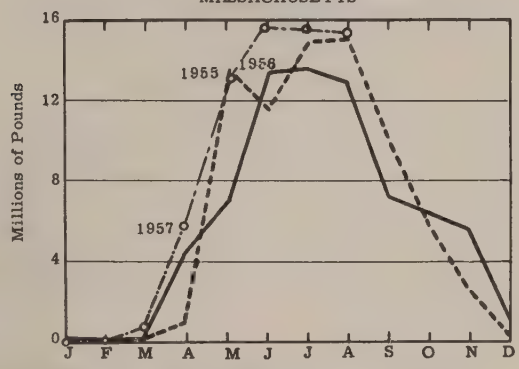
NATIONAL TUNA WEEK, OCTOBER 31-NOVEMBER 9



WHITING

Market - Steady Supplies - Liberal Demand - Good

CHART 36 - LANDINGS OF WHITING
MASSACHUSETTS



Landings, January - August

(Massachusetts)

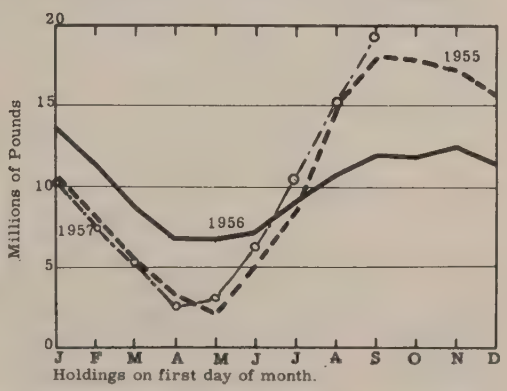
1957..... 46,549,000 Lbs.

1956..... 36,114,000 Lbs.

1955..... 56,778,000 Lbs.

Landings for the first eight months of 1957 were approximately 28 percent higher than those in similar period during 1956. Production will drop considerably during the fourth quarter, as the good fishing season draws to a close (Chart 36).

CHART 37 - WHITING IN COLD STORAGE



Cold-Storage Holdings

September 1

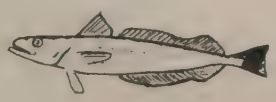
1957.....19,419,000 Lbs.

1956.....12,025,000 Lbs.

1955.....18,050,000 Lbs.

Cold-storage holdings for whiting on September 1 were up more than 61 percent from the abnormally low stocks a year earlier (Chart 37).

Prices will be generally steady during the fourth quarter.



CLAMS, FRESH

Market - Firm Supplies - Light-to-Moderate Demand - Good

Production, January-July

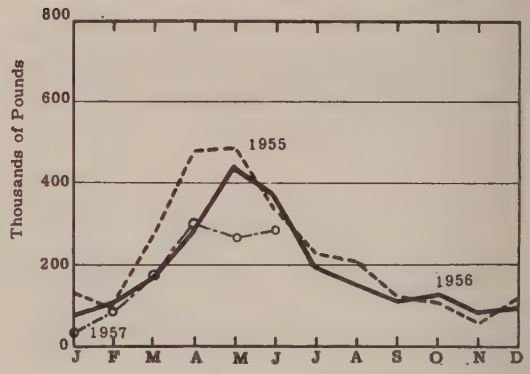
(Maine Soft Clams)

1957..... 1,412,000 Lbs.

1956..... 1,647,000 Lbs.

1955..... 2,032,000 Lbs.

CHART 38 - PRODUCTION OF MAINE SOFT CLAMS



Soft clam production in Maine continued to decline again as indicated by figures representing the first seven months of 1956, which showed a 14 percent decrease from production through a similar period last year (Chart 38).

Prices are expected to remain firm.

SURF CLAMS

New Jersey Landings

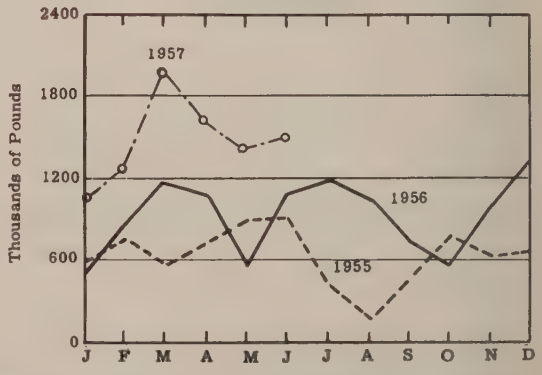
January - June

1957..... 9,041,000 Lbs.

1956..... 5,242,000 Lbs.

1955..... 4,151,000 Lbs.

CHART 39 - LANDINGS OF SURF CLAMS NEW JERSEY



Landings of surf clams in New Jersey for the first six months of 1957 were 72 percent greater than for the same period of 1956 (Chart 39).

Production during the fourth quarter is expected to decline slightly because of adverse weather.

Prices will remain steady despite reduced landings.

CRABS AND CRAB MEAT, FRESH AND FROZEN

Market - Steady Supplies - Moderate Demand - Good

Production of hard crabs will be very good in the Gulf, South Atlantic, and Chesapeak areas during the fourth quarter. Dungeness crab landings on the Pacific Coast will also continue high.

Cold-Storage Holdings

September 1

1957.....1,785,000 Lbs.
1956.....2,349,000 Lbs.
1955.....721,000 Lbs.

Cold-storage holdings of crabs and crab meat on September 1 were less than those a year earlier. Most of the holdings consisted of dungeness and king crabs and crab meat, and were located in the Pacific States.

Prices for Gulf and Atlantic crab meat will become seasonally steady. Dungeness crab prices are the lowest in years because of a heavy catch. The price structure for next season's production will naturally depend upon the availability of crabs, and with the expanded market the demand should be good.

CRABS AND CRAB MEAT, CANNED

Pack, January - August

1957..... 9,070,000 Std. Cases
1956..... 8,822,000 Std. Cases
1955.....19,909,000 Std. Cases

Pack of canned crab meat in the Gulf States during the first eight months of this year was up almost 3 percent from 1956 but still fell below the 1955 pack at the same date. The pack during the fourth quarter is generally low.

CRABS AND CRAB MEAT, CANNED (Cont.)

Imports

January - July

1957.....3,721,000 Lbs.
1956.....3,595,000 Lbs.
1955.....2,173,000 Lbs.

Imports of canned crab meat, mostly king crab through the first seven months of this year were up slightly more than 3 percent from those during the same period a year earlier. Imports are mainly from Japan and are making heavy inroads into U. S. markets.

Prices for domestically produced canned crab meat are expected to be steady in the fourth quarter.

LOBSTERS, NORTHERN

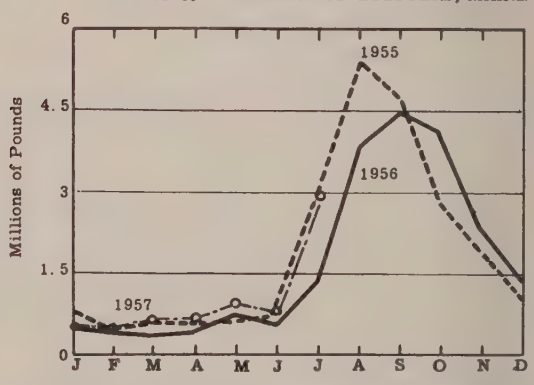
Market - Steady Supplies - Liberal Demand - Good

Maine Landings

January - July

1957..... 7,043,000 Lbs.
1956..... 4,468,000 Lbs.
1955..... 6,675,000 Lbs.

CHART 40 - LANDINGS OF LOBSTERS, MAINE



Landings of lobster in Maine through July of 1957 increased almost 58 percent above the year earlier period, but, were only 5 percent higher than landings during the same period in 1955. Landings will decline steadily during the fourth quarter (Chart 40).

LOBSTERS, NORTHERN (Cont.)

Imports from Canada

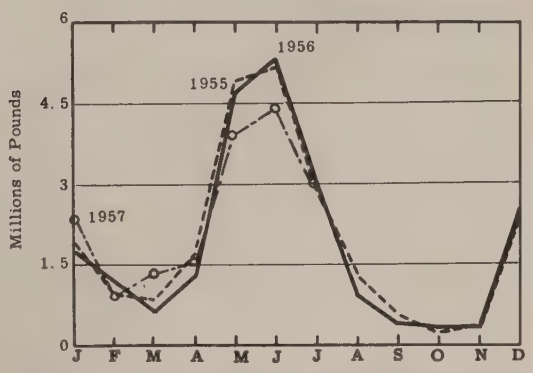
January - July

1957..... 17,264,000 Lbs.

1956..... 17,996,000 Lbs.

1955..... 18,342,000 Lbs.

CHART 41 - IMPORTS OF LOBSTERS (CANADA)



Imports of lobsters from Canada through the first seven months of this year were slightly lower than those of the same period of 1956. These imports generally decline sharply in the third quarter then gradually rise (Chart 41).

Prices will not change considerably during the last quarter but will rise above those for third quarter.

LOBSTERS, SPINY

Market - Steady Supplies - Liberal Demand - Good

Cold-Storage Holdings

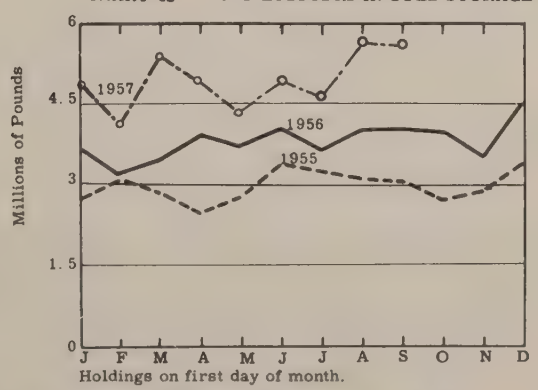
September 1

1957..... 5,665,000 Lbs.

1956..... 3,984,000 Lbs.

1955..... 3,084,000 Lbs.

CHART 42 - SPINY LOBSTERS IN COLD STORAGE



Cold-storage holdings of spiny lobsters on September 1 were up 42 percent from a year earlier (Chart 42).

LOBSTERS, SPINY (Cont.)

Imports

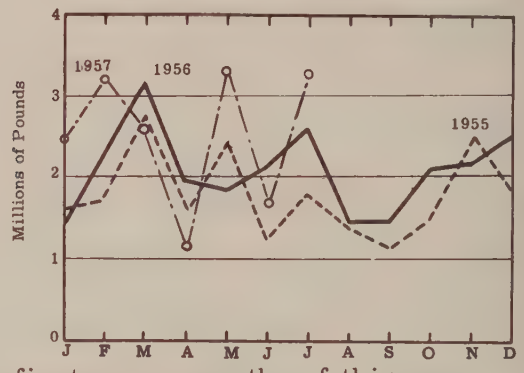
January - July

1957.....17,730,000 Lbs.

1956.....15,467,000 Lbs.

1955.....13,181,000 Lbs.

CHART 43 - IMPORTS OF SPINY LOBSTERS



Imports of spiny lobsters during the first seven months of this year exceeded those of the same period of 1956 by almost 15 percent. Imports usually decline toward the end of the third quarter then gradually rise. Domestic production is negligible, prices are expected to be firm (Chart 43).

OYSTERS, FRESH-SHUCKED

Market - Strong Supplies - Light-to-Moderate Demand - Exceeds Supply

Production will be light at the beginning of the fourth quarter and increase during November and December. However, total production will be below 1956 to the extent that supplies will fall short of requirements.

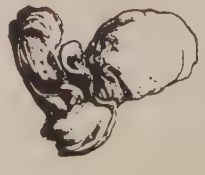
Prices will remain high.

OYSTERS, CANNED

Market - Firm Supplies - Light Demand - Moderate

Total pack of canned oysters in the Gulf States during the 1956-57 season ending July 31 was 306,161 cases compared with 316,381 cases during the 1955-56 season. Pacific Coast oyster season is getting underway and production will be about normal.

Prices are expected to remain firm at last year's level.



SCALLOPS, SEA

Market - Steady Supplies - Moderate Demand - Good

New Bedford Landings

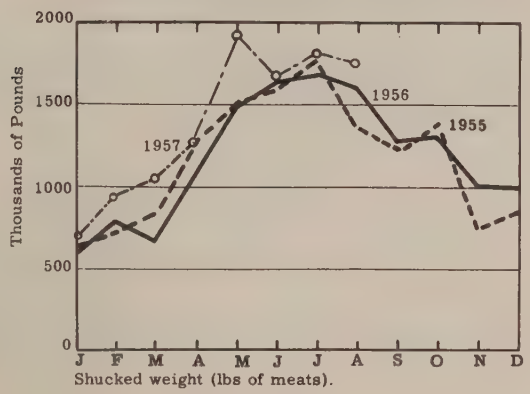
January - August

1957..... 11,161,000 Lbs.

1956..... 9,721,000 Lbs.

1955..... 9,751,000 Lbs.

CHART 44 - LANDINGS OF SCALLOPS, NEW BEDFORD



Shucked weight (lbs of meats).

Landings of sea scallops are expected to drop sharply in the fourth quarter, a seasonal condition. During the first eight months, 1957, landings were 15 percent higher than those of a similar period in 1956 (Chart 44).

Cold-Storage Holdings

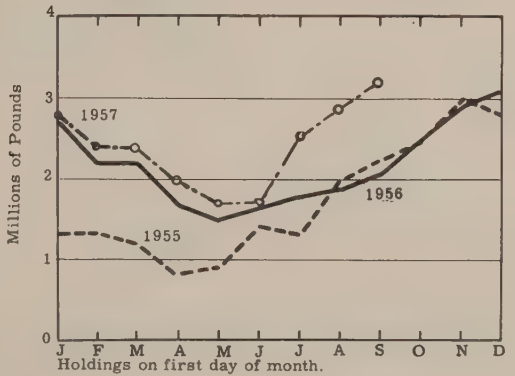
September 1

1957..... 3,179,000 Lbs.

1956..... 2,046,000 Lbs.

1955..... 2,234,000 Lbs.

CHART 45 - SCALLOPS IN COLD STORAGE

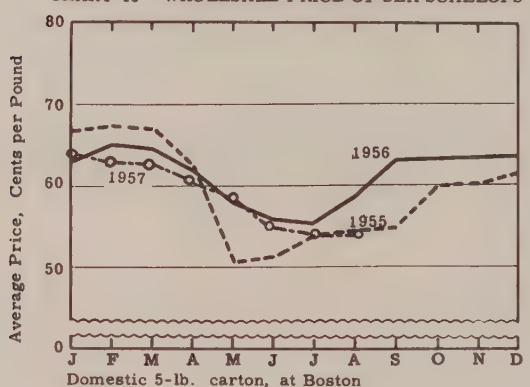


Holdings on first day of month.

Cold-storage holdings on September 1 were 55 percent greater than a year earlier and almost 43 percent more than holdings on September 1, 1955 (Chart 45).

Wholesale prices are expected to rise seasonally during the fourth quarter even though the July figure stood at the lowest since June of 1955 (Chart 46).

CHART 46 - WHOLESALE PRICE OF SEA SCALLOPS



SHRIMP, FRESH AND FROZEN

Market - Firm Supplies - Moderate Demand - Good

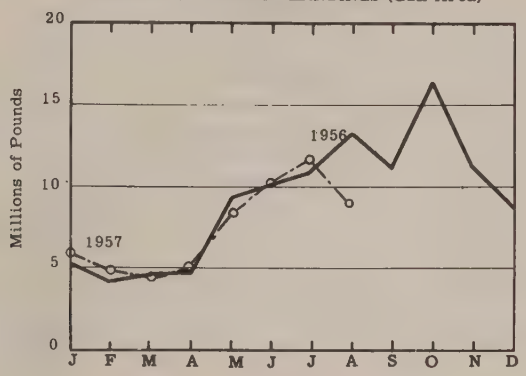
Production

January-August

(Headless)

	Gulf of Mexico
1957	55,700,000 Lbs.
1956	55,200,000 Lbs.

CHART 47 - SHRIMP LANDINGS (Gulf Area)



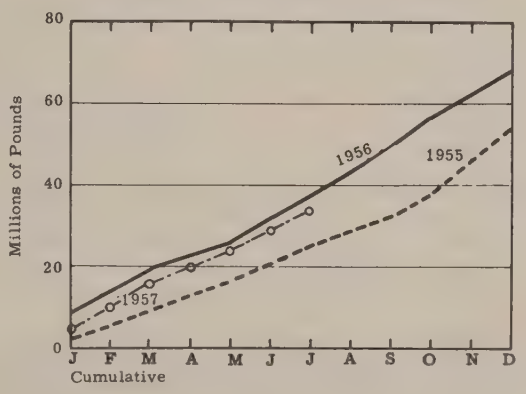
Landings of shrimp in the Gulf States through the first eight months of 1957 were slightly above those of a year earlier. Supplies, through the fourth quarter, are not expected to meet the demand (Chart 47).

Imports

January - July

1957	34,356,000 Lbs.
1956	37,469,000 Lbs.
1955	25,371,000 Lbs.

CHART 48 - IMPORTS OF SHRIMP



Imports of shrimp during the first seven months of 1957 were 8 percent less than for the same 1956 period and about 35 percent more than in 1955. Shrimp imports have a tendency to rise during the fourth quarter, but reports from Mexico's west coast indicate only a fair season thus far (Chart 48).

Cold-Storage Holdings

September 1

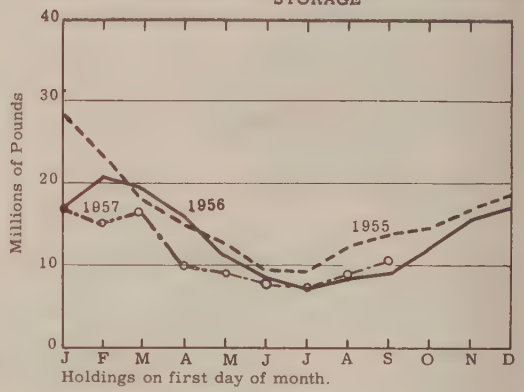
(Raw Headless)

1957..... 10,677,000 Lbs.

1956..... 8,786,000 Lbs.

1955..... 13,333,000 Lbs.

CHART 49- RAW HEADLESS SHRIMP IN COLD STORAGE



Cold-Storage Holdings

September 1

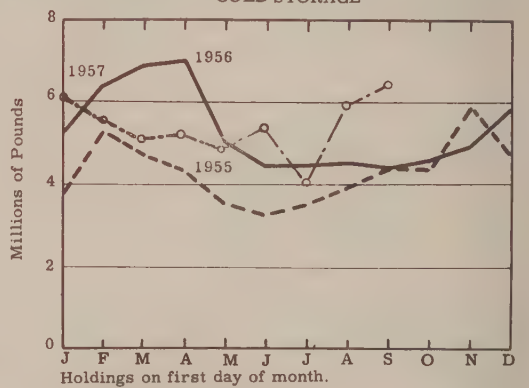
(All Other)

1957..... 6,438,000 Lbs.

1956..... 4,382,000 Lbs.

1955..... 4,364,000 Lbs.

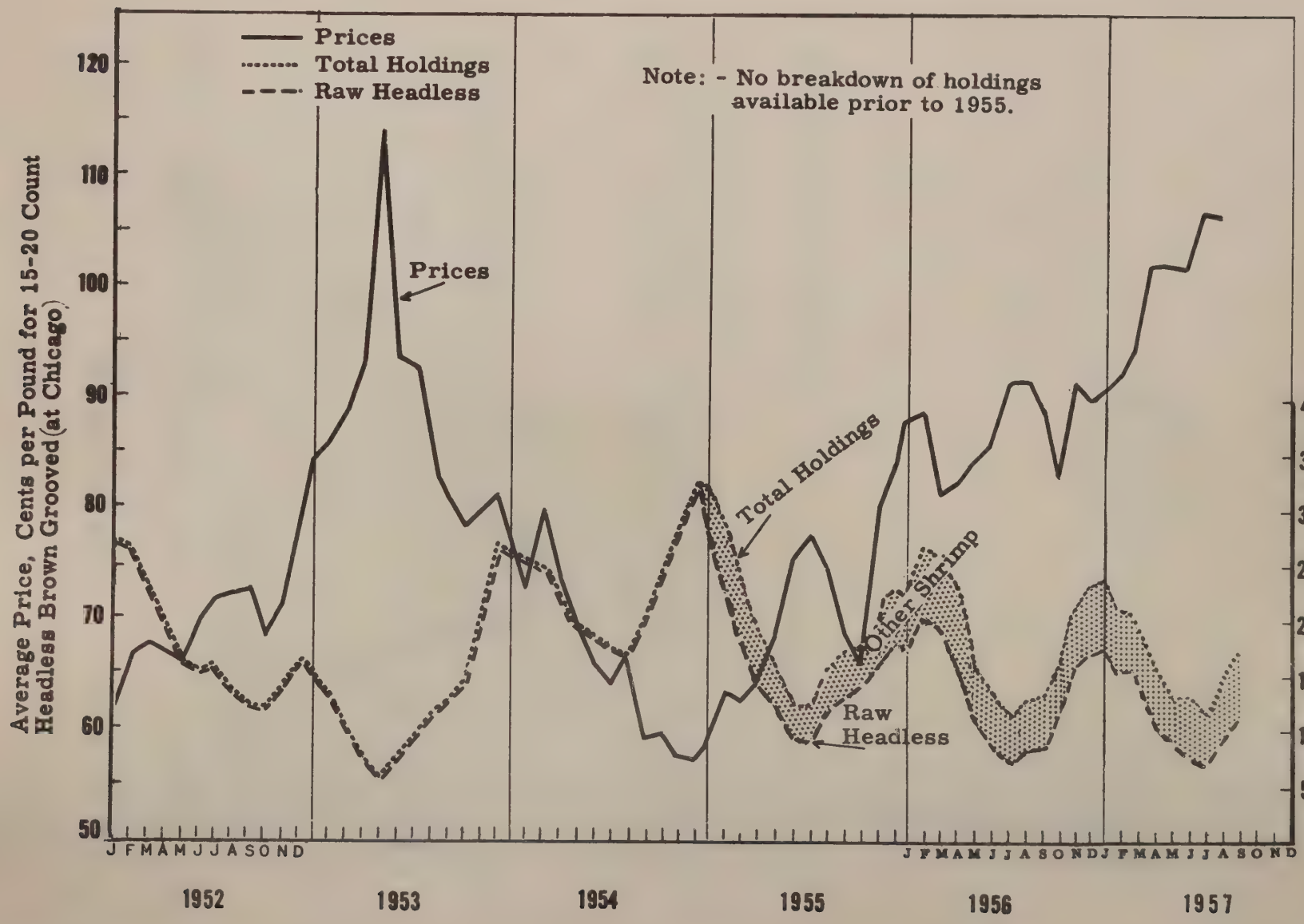
CHART 50 - ALL OTHER (PROCESSED) SHRIMP IN COLD STORAGE



Cold-storage holdings of raw headless shrimp on September 1 were almost 22 percent higher than those on a similar date 1956. Holdings of all other shrimp, including breaded, were up 49 percent (Charts 49 and 50).

Wholesale prices at Chicago for headless 15-20 count brown during August averaged 16 percent higher than for August, 1956. Usual dip during beginning of fourth quarter will occur and then a gradual leveling off to stable prices, but at a higher level than in 1956.

CHART 51 - SHRIMP IN COLD STORAGE AND WHOLESALE PRICES



SHRIMP, CANNED

Market - Steady Supplies - Light Demand - Good

Pack

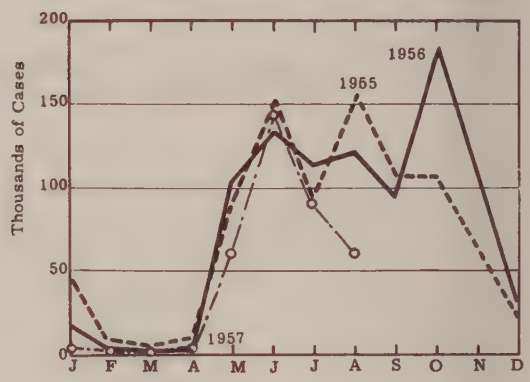
January-August

1957..... 370, 200 Std. Cases

1956..... 480, 800 Std. Cases

1955..... 565, 700 Std. Cases

CHART 52 - CANNED SHRIMP PACK (GULF)



Pack of canned shrimp in the Gulf States through August, 1957, was 23 percent below the same period last year and approximately 34 percent lower than the first eight months of 1955. Indications are that the run of shrimp for canning has been poor and total season pack will not equal that of recent years (Chart 52).

Prices probably will remain firm even though consumer resistence to present prices will not lighten.

Fresh-water Fish

Cold-Storage Holdings

September 1

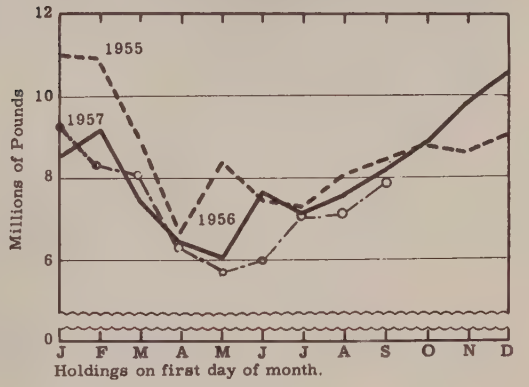
(United States)

1957.....7, 908, 000 Lbs.

1956.....8, 201, 000 Lbs.

1955.....8, 423, 000 Lbs.

CHART 53 - FRESH-WATER FISH IN COLD STORAGE



Cold-Storage Holdings

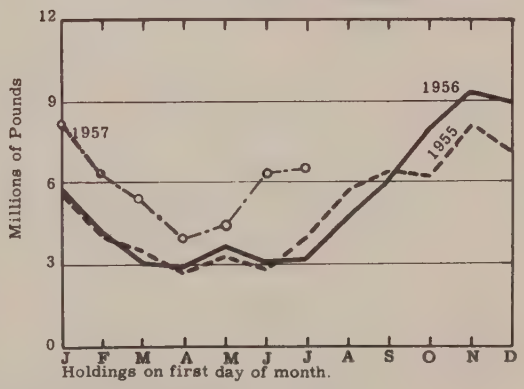
July 1

(Canada)

1957.....6, 630, 000 Lbs.

1956.....3, 453, 000 Lbs.

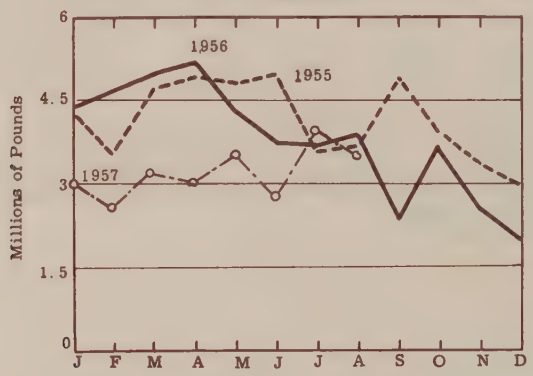
CHART 54 - CANADIAN FRESH-WATER FISH IN COLD STORAGE



Cold-storage holdings of fresh-water fish in the United States on September 1 were down almost 4 percent from a year earlier. Holdings in Canada on July 1, 1957, were 93 percent higher than those on a similar date in 1956 (Charts 53 and 54).

Fresh-water fish receipts at Chicago during August were 3.5 million pounds or about 14 percent lower than those of the previous month, and 13 percent below August of 1956. The perch production will be heavy about the middle of October, with chub production probably below average (Chart 55).

CHART 55 - RECEIPTS OF FRESH-WATER FISH
(CHICAGO)



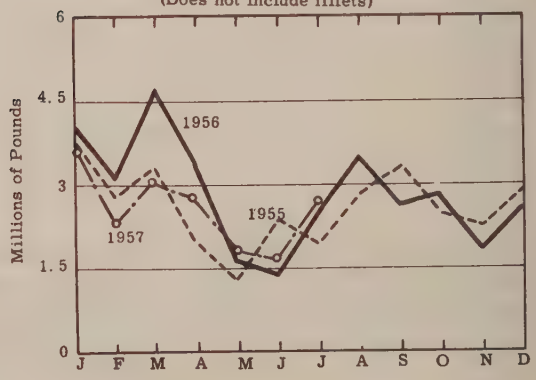
Fish Imports

(Canada)

January - July

1957	18,365,000 Lbs.
1956	21,019,000 Lbs.
1955	17,384,000 Lbs.

CHART 56 - IMPORTS OF FRESH-WATER FISH
(CANADA)
(Does not include fillets)



Imports of fresh-water fish from Canada through the first seven months of 1957 were more than 12 percent less than those a year earlier (Chart 56).

Fillet Imports

(Canada)

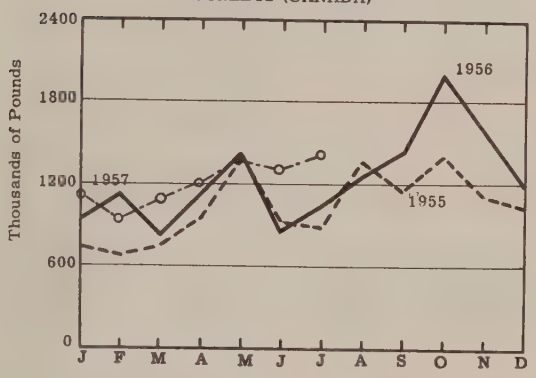
January - July

1957..... 8,602,000 Lbs.

1956..... 7,590,000 Lbs.

1955..... 6,541,000 Lbs.

CHART 57 - IMPORTS OF FRESH-WATER FISH FILLETS (CANADA)



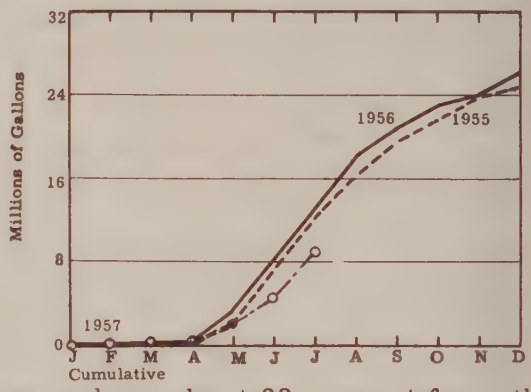
Imports of fillets of fresh-water fish through July of 1957 were up about 13 percent from the same period last year. Fourth quarter imports will probably decline before rising late in December (Chart 57).

Prices should remain steady throughout the fourth quarter.

FISH OIL

Market - Firm Supplies - Moderate Demand - Good

CHART 58 - FISH OIL PRODUCTION



Production

January - July

1957..... 9,099,000 Gal.

1956..... 13,571,000 Gal.

1955..... 12,159,000 Gal.

Production of fish oils through July was down about 33 percent from the same period last year and probably will continue to show a decline from production during last quarter, 1956(Chart 58).

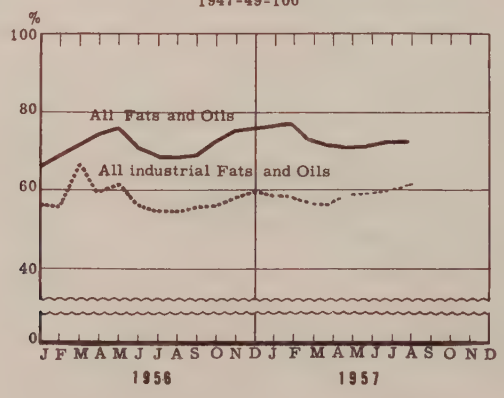
Exports, January-July

1957..... 63,498,000 Lbs.
1956..... 77,334,000 Lbs.
1955..... 60,885,000 Lbs.

Exports of fish oil for the first seven months of 1957 were approximately 18 percent lower than the year earlier, but still higher than those during the same period of 1955. Demand will remain good during the fourth quarter.

Wholesale price index for all fats and oils in August was 72.7, four points higher than August, 1956, and the highest for that month since 1954 (Chart 59).

CHART 59 - WHOLESALE PRICE INDEXES
1947-49=100

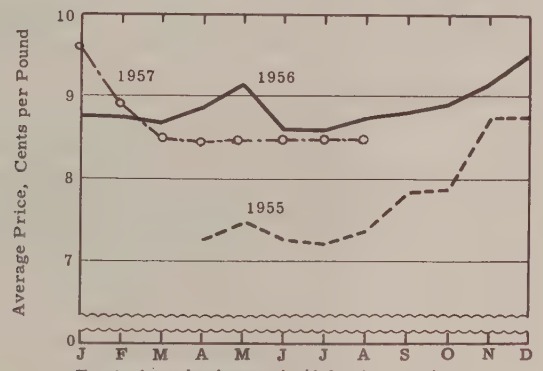


FISH OIL (Cont.)

The index for all industrial fats and oils was at 62.7. Not since February, 1954, has the index gone above 62.

Price of menhaden oil, which averaged 8.53 cents per pound in August, will have a tendency to rise during the last quarter because of shorter supply (Chart 60).

CHART 60 - WHOLESALE PRICE OF MENHADEN OIL



For tank carloads, crude (Atlantic Coast)

FISH MEAL

Market - Steady Supplies - Moderate Demand - Light

Production

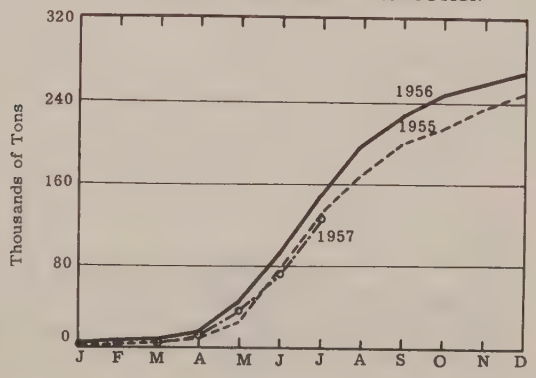
January - July

1957.....127,491 Tons

1956.....152,425 Tons

1955.....129,994 Tons

CHART 61 - FISH MEAL PRODUCTION



Production of fish meal through July was about 16 percent less than that of a similar period a year earlier, and approximately 2 percent below 1955. The principal source of fish meal is from the menhaden fishery which normally declines during the last quarter. The catch of menhaden for January-July, 1957, amounted to 832.4 million pounds compared with 1,142.1 million pounds for 1956 (Chart 61).

Imports

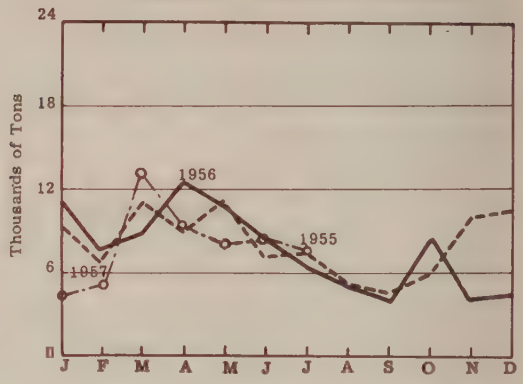
January - July

1957.....55,487 Tons

1956.....66,128 Tons

1955.....62,843 Tons

CHART 62 - IMPORTS OF FISH MEAL



Imports of fish meal in the first seven months of 1957 were down 16 percent from a year earlier. During October and November, imports are usually at low levels but begin to rise gradually in December (Chart 62).

CHART 63 - WHOLESALE FEEDSTUFF PRICE INDEX
1947-49=100

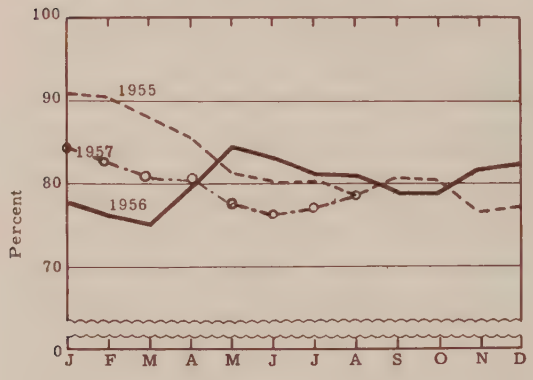
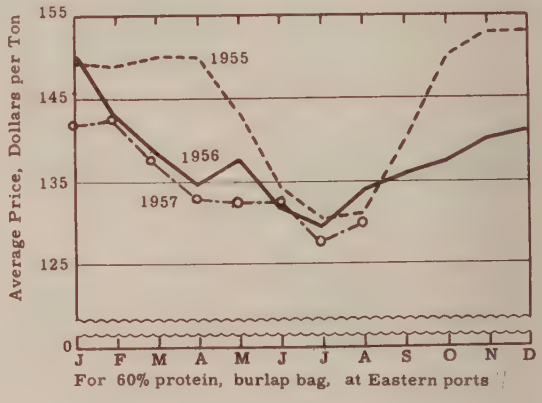


CHART 64 - WHOLESALE PRICES OF MENHADEN MEAL



For 60% protein, burlap bag, at Eastern ports

Wholesale feedstuff price index for August was down 2.7 points from a year earlier but was up 1.5 points from the preceeding month. The lowest level thus far in 1957 was marked in June when the index stood at 76.1 (Chart 63).

Wholesale prices for fish meal began to rise toward the latter part of the third quarter, but did not reach the level of a year earlier. Because of the seasonal drop in the menhaden production, prices of meal are expected to rise slightly during the last quarter (Chart 64).

The statements appearing in this report are interpretations of past experiences influenced by current indications of what probably will occur. Wide use is made of interviews and correspondence with representative members of the commercial fishing industry, in order to obtain the opinion of the trade as to the business conditions generally expected to prevail during the period of the year covered by the report. Five-year averages are no longer shown due to realignments in statistical reporting.

Sources of Chart Data

Chart 3, U. S. Department of Labor
Charts 11, 29, 30, 32, 34, 41, 43, 48, 56, 57, 62, U. S. Department of Commerce
Charts 1, 59, 63, U. S. Department of Agriculture
Charts 22, 33, California Department of Fish and Game, Marine Fisheries Branch
Chart 54, Canadian Bureau of Statistics

Market Terms Used in This Report

The terms under the headings Market, Supplies, and Demand are intended to indicate the degree of market activity produced by the particular supply and demand situation.

Market refers to movement of supplies and the price structure.

Supplies refers to available stocks, i. e. receipts, imports, cold-storage holdings, and processed fish and shellfish. The terms used are relative and do not signify any particular quantity.

Demand measures the readiness of the trade to absorb supplies.

Market	Supplies	Demand
Excited	Light	Exceeds supply
Stronger	Light-to-Moderate	Brisk
Strong	Moderate	Active
Active	Moderate-to-Liberal	Good
Firm	Liberal	Improving
Steady	Heavy	Moderate
Unsettled	Very heavy	Light
Dull		Slow
Weak		Practically no demand
Weaker		No demand
Demoralized		

BIBLIOGRAPHY

Some of the publications consulted in preparing this report are listed below. Publications of the Fish and Wildlife Service are not included.

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- Consumer Credit
- Department Store Sales
- National Summary of Business Conditions

U. S. Department of Agriculture:
- Agricultural Outlook Digest
- Agricultural Situation
- Cold Storage Report
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- Demand and Price Situation
- Fats and Oils Situation
- Feed Market Summary
- Foreign Agriculture Circular
- Foreign Crops and Markets
- Livestock and Meat Situation
- Marketing and Transportation Situation
- National Food Situation
- Poultry and Egg Situation
- Weekly Feed Market Review

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- Economic Indicators

U. S. Department of Commerce:
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- Facts for Industry, Fats and Oils
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- Industry Survey
- Monthly Retail Trade Report
- Monthly Wholesale Trade Report
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- U. S. Exports of Domestic and Foreign Merchandise
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U. S. Department of Labor:
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- Wholesale Price Indexes

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- Business Week
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25 4 2 Interior—Duplicating Section, Washington, D. C.